

# Work Smarter with Your Customer Data

Companies that rely on accurate customer and lead data choose breakthrough data quality solutions from ActivePrime to save money, time and aggravation. What puts ActivePrime's CleanCRM ahead of the rest is a cutting edge, patent-pending Data Conditioning Framework.

Unlike less advanced systems, CleanCRM leverages a sophisticated data conditioning engine that identifies and cleans duplicate, incomplete and erroneous information not just within the CRM system, but also on new files **before** they are imported.

Data quality managers work smarter not harder with CleanCRM.

## Use ActivePrime CleanCRM when you need to:

- 1 Cleanse and de-dupe while importing
- 2 Verify, fix, enhance, and standardize messy CRM data
- 3 Append data from external commercial data sources
- 4 Compare and correct data against a master directory

## Maximize Sales Efficiency with ActivePrime CleanCRM

Have you ever had a sales rep search for a company in the CRM system, find multiple records, and have no idea where to put notes? CleanCRM can help. Our clients estimate they save the average sales rep one to two days a month over manually merging their contacts -- while also dramatically improving accuracy. Saving time and having correct pipeline and forecasts are invaluable productivity enhancements.

“CleanCRM is an efficient, affordable, yet highly scalable utility that enables our business to more accurately measure and achieve success.”  
-Time Warner Cable  
Commercial Services

## Get Started Quickly and Easily

CleanCRM is the complete solution for maintaining data quality. Plus, it's easy to use: ActivePrime CleanCRM's wizard-based user interface was designed for marketing professionals, and deep technical expertise is not necessary to get up and running. The software **seamlessly integrates into** salesforce.com.

## Data Quality Applications: Understanding the Differences

### What questions do I ask to evaluate a data quality solution?

1. How do you correct city and state misspellings, such as “anda clarita, calli” to “Santa Clarita, CA”?  
**CleanCRM automatically corrects city and state spellings.**
2. How do you blend together data from different fields into one correct record without losing important information?  
**CleanCRM can take dozens of duplicate records and funnel the key information into one best record, which you approve.**
3. Are you able to match typographical errors such as “Pharmaceutical” and “harmaceutic”?  
**CleanCRM uses a combination of patent-pending algorithms to catch such tricky representations.**

# How ActivePrime CleanCRM Works

<p><b>Step 1</b></p> <p><b>Choose the Path that Works Best for YOU and Your Users</b></p>	<p>CleanCRM gives you the flexibility to decide the sequence of events you follow while cleansing your data, eliminating user confusion and error:</p> <ul style="list-style-type: none"> <li>• <b>Import a CSV File, Standardize It, AND De-Dupe It Against Your CRM System ALL IN ONE STEP:</b> other applications force you to pollute your database with dirty data and then clean it up. In a seamless process, CleanCRM cleans first, then merges, keeping problem data out of your CRM.</li> <li>• <b>Standardize and De-Dupe Your CRM System or Independent CSV files</b> – CleanCRM can be used on a regular basis to keep your CRM in top shape. CleanCRM will also run on Excel files and other CSV data outside of your CRM system.</li> <li>• <b>Extend the Power of Your Database by Integrating 3rd Party Data</b> – Add data from a reference source by simply matching your CRM data using similar matching, no hassle with IDs required. You can choose to update words, fields, or entire records.</li> </ul>																				
<p><b>Step 2</b></p> <p><b>Cleanse the Disruptive Data in Your CRM</b></p>	<p>With CleanCRM's breakthrough formatting and standardization technology, your data is quickly and professionally cleansed:</p> <ul style="list-style-type: none"> <li>• <b>Address Fields Are Formatted and Verified</b> – Make your mailings more cost-effective. Insert correctly spelled city and state data. Verify and update zip codes. Put Address 1 and Address 2 data in the appropriate place. Find spelling errors. For example, <i>Suite 25, 1 Main St. Granville, Massachusetts, United States, 1034</i> becomes <i>1 Main St, Suite 25, Granville, MA, USA 01034</i></li> <li>• <b>Enrich data</b> – CleanCRM comes with postal data as part of the package so if a Zip code is missing, it will automatically populate.</li> <li>• <b>Professionalize</b> – Ensure that mailings and other customer-facing communications look professional with formatting corrections: <i>JANE smith</i> becomes <i>Jane Smith</i></li> <li>• <b>Apply Contextual Intelligence</b> – Standardize the spelling of Top 1000 Company Names: <i>ADM</i> becomes <i>Archer Daniels Midland</i></li> </ul>																				
<p><b>Step 3</b></p> <p><b>Customize How Your Duplicates Are Matched</b></p>	<p>With CleanCRM, you're in control of your own duplicate matching options. For example, you can:</p> <ul style="list-style-type: none"> <li>• <b>Use Advanced Logic</b> – Incorporate AND statements as well as OR statements all without having to write queries</li> <li>• <b>Find Similar Matches</b> – Use powerful algorithms to find tricky SIMILAR matches like "Mancy" and "Nancy"</li> <li>• <b>Match Nicknames</b> – "Becky" and "Rebecca", or "Dick" and "Richard"</li> <li>• <b>Match Intelligently</b> – Go to the root of the data and find matches like "The Sports Authority" and "Sports Authority", "7th Heaven" and "Seventh Heaven".</li> </ul>																				
<p><b>Step 4</b></p> <p><b>Take Control of Your Data Down to the Field Level and Prevent Data Loss</b></p>	<p>CleanCRM lets you preview and customize changes to your data at the field level before merging. Because CleanCRM automatically does the merge, users avoid having to write custom scripts to import their new lists.</p> <table border="1" data-bbox="451 1612 1463 1738"> <thead> <tr> <th>Duplicate #</th> <th>First Name</th> <th>Address 1</th> <th>Phone Number</th> <th>Fax Number</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="checkbox"/> Bill</td> <td></td> <td>617-555-1212</td> <td></td> </tr> <tr> <td>2</td> <td><input checked="" type="checkbox"/> William</td> <td>1 Main St</td> <td></td> <td>901-555-1212</td> </tr> <tr> <td>Final</td> <td>William</td> <td>1 Main St</td> <td>617-555-1212</td> <td>901-555-1212</td> </tr> </tbody> </table> <p>You can choose how to blend together data from your duplicate records. Unlike basic de-duping applications, CleanCRM will preserve data from merged fields, not delete it. All activities, notes, and other related objects are transferred from the duplicates before they're merged.</p>	Duplicate #	First Name	Address 1	Phone Number	Fax Number	1	<input type="checkbox"/> Bill		617-555-1212		2	<input checked="" type="checkbox"/> William	1 Main St		901-555-1212	Final	William	1 Main St	617-555-1212	901-555-1212
Duplicate #	First Name	Address 1	Phone Number	Fax Number																	
1	<input type="checkbox"/> Bill		617-555-1212																		
2	<input checked="" type="checkbox"/> William	1 Main St		901-555-1212																	
Final	William	1 Main St	617-555-1212	901-555-1212																	

To learn how your company can work smarter with your data email [sales@activeprime.com](mailto:sales@activeprime.com).